ATTORNEY DOCKET NO.   PATENT APPLICATION
IEX 2046000 (4889:70)   SERIAL NO. 09/504,330

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Applicant: Paul Leamon

Title: METHOD AND SYSTEM FOR SKILLS-BASED PLANNING AND
              SCHEDULING IN A WORKFORCE CONTACT CENTER ENVIRONMENT

Serial No.:   09/504,330

Filed: 2/14/2000

Group: 3625

Examiner: Cuong H. Nguyen

INTERVIEW WITH EXAMINER

I, Alan Cooper, conducted a brief interview with the Examiner, Mr. Nguyen, yesterday, August 19, 2003. I initially requested an interview for the latter part of this week. The Examiner and I then agreed upon a telephone interview on Friday, August 29, 2003 at 1:00 pm central time. In response, the Examiner said he would allow an extension for the 2-month delay from the original due-date of Monday, August 25th to a week from Monday, September 1st. September 1st is Labor Day, so the extended due date would be Tuesday, September 2nd.

By: _Alan R Cooper_
Dated: _August 20, 2003_   Alan Cooper, Reg. No. 51,217
                                      Attorney for Applicant

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Facsimile Information Sheet

DATE: August 28, 2003   CLIENT/MATTER NO.:   IEX 2046000-09/504,330

TO: Mr. Nguyen

FIRM NAME: IEX

CITY, STATE:

FACSIMILE NUMBER: 703 305 7687   TELEPHONE NUMBER:

RE: Proposed Claims for IEX 2046000-09/504,330

TOTAL NUMBER OF PAGES: 6

FROM: Alan Cooper

MESSAGE: Dear Mr. Nguyen,

Attached are some proposed Amendments for the Claims for IEX 2046000. I and the inventor, Mr. Paul Leamon, are looking forward to speaking with you tomorrow.

Thank you,

Alan

Operator

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IEX 2046000

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IN THE CLAIMS:

Please note that all pending, non-withdrawn claims are included herein for the convenience and efficiency of examination, and that only those claims so indicated as amended are being amended herein:

1.   (Presently Amended)   A method of allocating and scheduling requirements for agents in a skills-based contact center environment organized into a hierarchy of one or more business units at a first level, one or more contact types at a second level, and one or more management units at a third level, comprising:

creating a set of contact allocations that define how contacts are distributed from a given business unit to multiple ~~call~~ contact types;

creating a set of requirement allocations that define how agent requirements are distributed from a ~~call~~ contact type to one or more management units; and

allocating forecasted contacts and forecasted agent requirements based on the created contact and requirement allocations.

2.   (Previously Presented) The method as described in Claim 1 wherein the created contact allocations are at least minimum contact allocations, wherein the minimum contact allocations are defined by a user.

3.   (Previously Presented) The method as described in Claim 2 wherein the created requirement allocations are minimum agent requirement allocations.

4.   (Previously Presented) The method as described in Claim 1 wherein the created contact allocations are at most maximum contact allocations, wherein the maximum contact allocations are defined by a user.

5.   (Previously Presented) The method as described in Claim 4 wherein the created requirement allocations are maximum agent requirement allocations.

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6.   (Previously Presented) The method as described in Claim 1 wherein the created contact allocations are from the minimum to the maximum contact allocations, wherein the minimum and maximum contact allocations are defined by a user.

7.   (Previously Presented) The method as described in Claim 6 wherein the created requirement allocations are minimum and maximum agent requirement allocations.

8.   (Original) The method as described in Claim 1 wherein the allocating step allocates forecasted contacts and forecasted requirements using agent availability data.

9.   (Original) The method as described in Claim 8 further including the step of predicting the agent availability data.

10.   (Original) The method as described in Claim 9 wherein the agent availability data is predicted by a schedule simulation.

11.   (Original) The method as described in Claim 8 wherein the agent availability data is characterized by contact type.

12.   (Original) The method as described in Claim 1 further including the step of generating agent schedules for the management units.

13.   (Original) The method as described in Claim 1 wherein a management unit is a collection of agents located at a given contact center location.

14.   (Original) The method as described in Claim 13 wherein at least some agents in a management unit are multi-skilled.

15.   (Original) The method as described in Claim 1 wherein the contact center

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environment is a telephone call center.

16.   (Original) The method as described in Claim 1 wherein the contact center environment is a contact center that handles a contact selected from the group consisting of: telephone calls, voice mails, emails, faxes, mail, web callback requests, web chats, web voice calls, web video calls and outbound calls.

17.   (Original) A method of allocating and scheduling in a skills-based call center environment, comprising:

organizing the call center environment into a hierarchy of one or more business units at a first level, one or more call contact types at a second level, and a set of one or more management units at a third level;

having a user create a set of given call allocations that define how calls are distributed from a given business unit to multiple call types;

having the user create a set of given requirement allocations that define how agent requirements are distributed from a call type to one or more management units;

predicting agent availability by call type to generate agent availability data; and

allocating forecasted calls and forecasted agent requirements based on the given call and requirement allocations and the agent availability data.

18.   (Original) The method as described in Claim 17 wherein the agent availability data is predicted using a schedule simulator.

19.   (Original) The method as described in Claim 17 wherein the given call allocations and the given requirement allocations are minimum values.

20.   (Original) The method as described in Claim 17 wherein the given call allocations and the given requirement allocations are maximum values.

21.   (Original) The method as described in Claim 17 wherein the given call allocations and the given requirement allocations are minimum and maximum values.

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22.   (Original) An allocation method operative in a skills-based call center environment, comprising:

organizing the call center environment into a hierarchy of one or more business units at a first level, one or more call types at a second level, and a set of one or more management units at a third level;

allocating a percentage of incoming calls from a given business unit to one or more call types; and

allocating agent requirements for a given call type to one or more management units.

23.   (Original) The method as described in Claim 22 wherein a given management unit is a collection of agents at least some of which are multi-skilled.

24.   (Original) The method as described in Claim 22 wherein a given call type is associated with a given automatic call distributor (ACD).

25.   (Original) The method as described in Claim 22 wherein the step of allocating agent requirements further include predicting agent availability data using a schedule simulation.

26.   (Currently Amended) An allocation method operative in a skills-based contact center environment, comprising:

organizing the contact center environment into a hierarchy of zero or more business units at a first level, one or more contact types at a second level, and a set of one or more management units at a third level;

allocating a percentage of contacts from a given business unit to one or more ~~call~~ contact types; and

allocating agent requirements for the one or more contact types to one or more management units.

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27.   (Original)   The method as described in Claim 26 wherein a given management unit is a collection of agents at least some of which are multi-skilled.

28.   (Original) The method as described in Claim 26 wherein a given contact type is associated with a given automatic work distributor.

29.   (Original) The method as described in Claim 26 wherein the step of allocating agent requirements further include predicting agent availability data using a schedule simulation.

30.   (Original)   An allocation method operative in a work environment organized into a hierarchy of one or more task types at a first level, and a set of one or more management units at a second level, comprising:

creating a set of given requirement allocations that define how agent requirements are distributed from a task type to one or more management units;

predicting agent availability by task type to generate agent availability data; and

allocating forecasted agent requirements based on the given requirement allocations and the agent availability data.

31.   (Original)   The method as described in Claim 30 wherein a given management unit is a collection of agents at least some of which are multi-skilled.

32.   (Original) The method as described in Claim 30 wherein the step of predicting agent availability uses a schedule simulation.

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Facsimile Information Sheet

DATE: August 20, 2003   CLIENT/MATTER NO.:   IBX 2046009
                                                          Application No. 09/504,330

TO: Mr. Cuong Nguyen

FIRM NAME: USPTO

CITY, STATE:

FACSIMILE NUMBER: 703 305 7687   TELEPHONE NUMBER:

RE: Interview Summary

TOTAL NUMBER OF PAGES:

FROM: Alan Copper

MESSAGE: Dear Mr. Nguyen,

Attached is a copy of a Summary of the Interview from yesterday. I should have an agenda for you by early to
the middle of next week.

Alan

                                                Operator

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